FAMILY REPORTING SOFTWARE

Users' Manual

HUD-50058
FRS

For Windows
Version 1.0

September 1995

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Introduction

The product described in this manual is "Family Reporting Software (FRS)". It is specifically designed for use with a communications software package called PC SprintMail®.

FRS and PC SprintMail® are available to Housing Agencies free of charge from the U.S. Department of Housing and Urban Development (HUD) for the sole purpose of collecting and transmitting HUD-50058 data to and from the MTCS Processing Center.

This product provides HAs with an on-line program to collect HUD-50058 information for the Section 8, and Public and Indian Housing programs as it is received from tenants. FRS also provides a database for storage, review, and updating of family information. If desired, a replica family report (HUD-50058) can be printed. FRS also prepares the completed tenant data for transmission to MTCS and enables receipt of error files from the MTCS Processing Center.

Each HA site should have a copy of the FRS software and Users' Manual. If your HA has multiple sites using the FRS software and requires more than one mailbox ID, please contact the MTCS Processing Center at 1-800-366-6827.

Minimum Hardware and Software Requirements

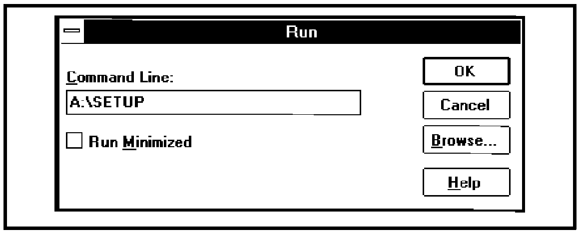
Computer	IBM or IBM-compatible with at least an 80386 processor
Monitor	Monochrome or Color with CGA, EGA, VGA, or better
Memory	512K of conventional memory available 4 MB of extended memory 20 MB of available hard disk space
Floppy Drive	3½ or 5 1/4 high density
Printer	Prints 8½" X 11" paper Prints 80 characters per line Form feed feature
Modem	9600, 2400, or 1200 baud HAYES or HAYES compatible Dedicated fax/modem telephone line
Software	DOS Version 3.3 or higher Microsoft Windows Version 3.0 PC SprintMail

Installation

1. Insert the disk labeled #1 into floppy drive A or B.

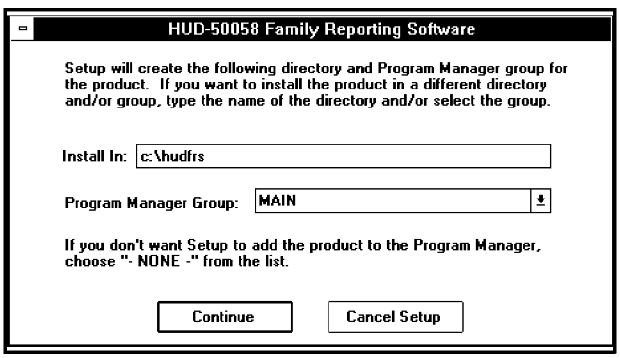
2. From Windows Program Manager's **File** menu, choose the **Run** command.

3. In the Command line box, type **A:\SETUP**, or **B:\SETUP** (depending on the drive in which you placed the disk).



4. Choose the **OK** button.
Setup will analyze your system.

5. Specify directory to be used to install FRS.
Setup will suggest a directory named "HUDFRS" on the C: drive. This directory may be changed if an alternate destination is desired.



6. Specify the Program Group to install and run FRS.
Setup will suggest the MAIN Program Group. The Program Group may be changed if an alternate destination is desired. Select Program Group by using the up and arrows on the keyboard or using mouse to click the list arrow next to Program Group name.

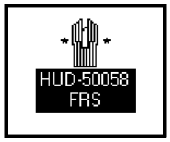
7. When prompted, remove diskette and insert next diskette until setup is complete.

The FRS Setup program will indicate to you when installation is complete.

Getting Started

Logging On to FRS

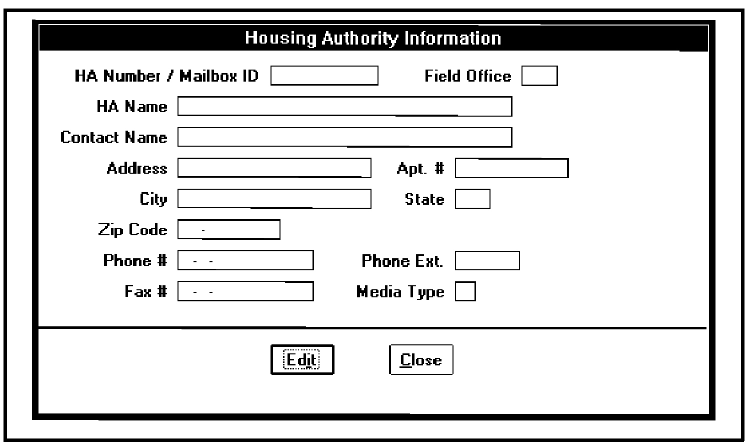
1. **Locate and choose the FRS ICON** (default was Main group) from the Windows Program Manager.



2. Enter **HUDFRS** in the password screen, tab to the OK button and press **enter** or click on **OK.**

   Note: The Housing Authority Information Window will appear the first time the FRS program is run. Once the Housing Authority Information is stored in FRS, the Main Menu will appear on subsequent log-ins.

Housing Authority Information



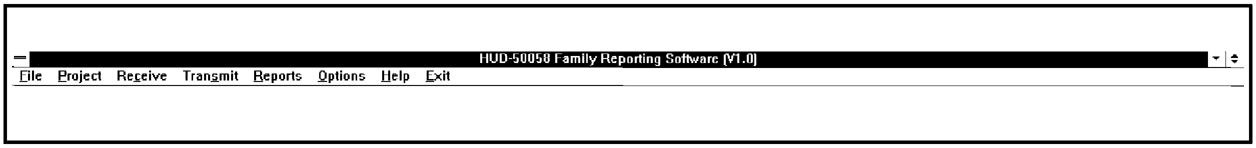
1. Select the EDIT button to enable data entry of HA information.
   Use the mouse to click the EDIT button or hit the ENTER key.

2. Enter the HA information.
   Note: Your HA Number/Mailbox ID can be found on the mailing label used to mail this manual. If your HA does not have, or is unsure of your mailbox ID, please contact the MTCS Processing Center for the correct ID.

3. After entering all HA information, save the HA information.
   Use the mouse to click the SAVE button or hit the ENTER key.

4. Close the Housing Authority Information window.
   Use the mouse to click the CLOSE button or hit TAB key once to highlight the CLOSE button and hit the ENTER key. The FRS Main Menu will appear.

Navigating Through FRS



The main menu bar displays the system functions horizontally across the top of the screen. Each menu function allows the user to access various user options available in the FRS. Functions can be selected by either using the mouse to click on the desired function or by simultaneously typing the ALT key and the first letter of the desired function, i.e. ALT and 'O' to select OPTIONS. When a function is selected, a vertical list box is displayed which shows the available user options.

Options may be selected by either 1)highlighting the desired option using the arrow keys and hitting the ENTER key or 2) using the mouse to point to and click on the desired option. Options shown with a **>** symbol have secondary options available. Selecting these options will cause the secondary to be displayed. If a secondary option is desired, highlight and select or click on the secondary option.

After an option is selected, FRS will display the window or set of windows associated with that option. While these windows are active, the Main Menu options are not available for selection. However, you may use the buttons available on the windows to either enter or review data on the tenant database or return to the Main Menu. These buttons may be selected by clicking the mouse on or using the tab key to highlight the desired button and hitting ENTER.

<u>Screen Navigation</u>

Information is entered into FRS screens by using the buttons on the bottom of each screen. The buttons and their functions are as follows:

Add	Enables entry of new tenant information
Edit	Enables editing of information already on tenant screens
Save	Saves current screen information
Delete	Deletes the current or highlighted record on the current screen
Close	Closes the current screen
Next Screen	Displays next screen to be completed
Prev Screen	Displays previous screen completed
Cancel	Cancels current user operation

As needed, the buttons can be selected by either using the mouse to click the desired button, or by simultaneously pressing the ALT key and the <u>underlined</u> letter on the key to be selected. After selecting the ADD or the EDIT key to enable data entry, the mouse or the TAB key may be used to move the cursor to the data fields on the screen.

If a data field has a selection list available (list arrow next to data field), the space bar may be used to display the available options. Once displayed the up or down arrow keys or the mouse may be used to select the desired response.

SprintMail Setup

Before FRS can be used to transmit your HUD-50058 data through SprintMail, FRS must be setup to interact with the PC SprintMail software, previously installed on your PC. If you do not have a copy of the SprintMail software, please contact the MTCS Processing Center

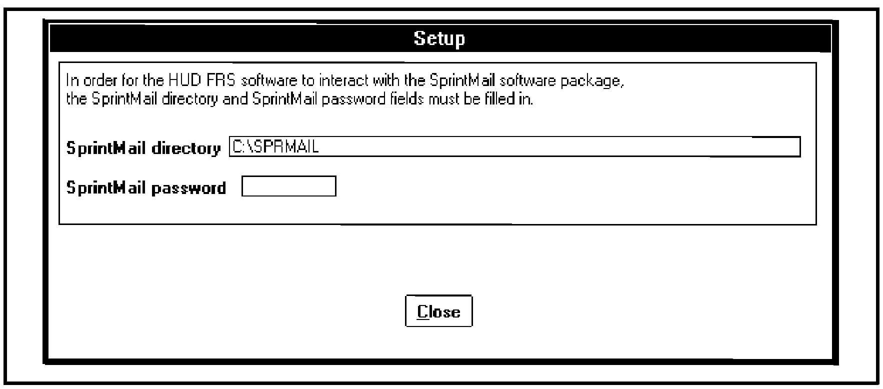
To setup SprintMail for FRS:

1. Selection OPTIONS from the FRS Main Menu.
   Use the mouse to click on Options, or simultaneously type the ALT and O keys on the keyboard.

2. Select SETUP from the pull down menu.
   Use the mouse to click Setup, or use the up and down arrows on the keyboard to highlight Setup then hit the ENTER key.

3. Select SPRINTMAIL form the secondary pull down menu.
   Use the mouse to click SprintMail, or use the up and down arrows to highlight SprintMail then hit the ENTER key.

4. Enter SprintMail Directory.
   Use the mouse to click and highlight the SprintMail Directory data entry field, or type the TAB key until the SprintMail Directory data entry field is highlighted. Once the field is highlighted enter information and hit ENTER key.



   Note: The standard SprintMail setup uses the C:\SPRMAIL directory.

5. Enter your SprintMail password.
   Type the SprintMail password selected during PC SprintMail setup and hit the ENTER key.

   Note: SprintMail requires you to change your password periodically. Repeat steps 1-5 each time your SprintMail password changes.

6. Select CLOSE button.
   Use the mouse to click the CLOSE button or hit the ENTER key.

Printer Setup

Printers to be used to print documents from FRS must be setup using the Print Setup option in FRS. The default printer settings are those selected for Microsoft Windows. However, these settings may be changed as needed.

To change the printer settings:

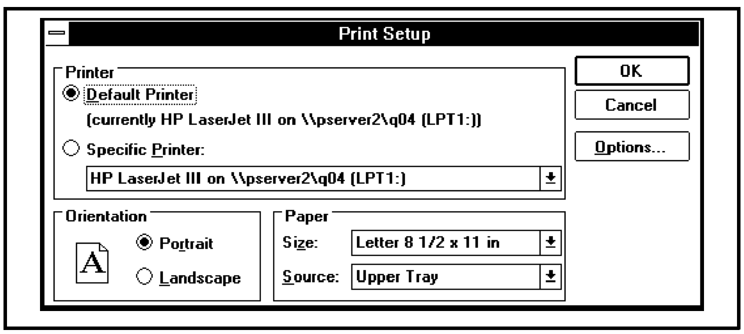
1. Selection OPTIONS from the FRS Main Menu.
   Use the mouse to click on Options, or simultaneously type the ALT and O keys on the keyboard.

2. Select SETUP form the pull down menu.
   Use the mouse to click Setup, or use the up and down arrows on the keyboard to highlight Setup then hit the ENTER key.

3. Select PRINTER from the secondary pull down menu.
   Use the mouse to click Printer, or use the up and down arrows to highlight Printer then hit the ENTER key.

4. Hit the P key or use the mouse to click on the SPECIFIC PRINTER radio button.

5. Select name of desired printer.
   Use the mouse to click on the list arrow to the right of the Printer Name box to view and highlight the desired printer, OR use the up and down arrows to highlight the desired printer the hit the TAB key to select printer name.

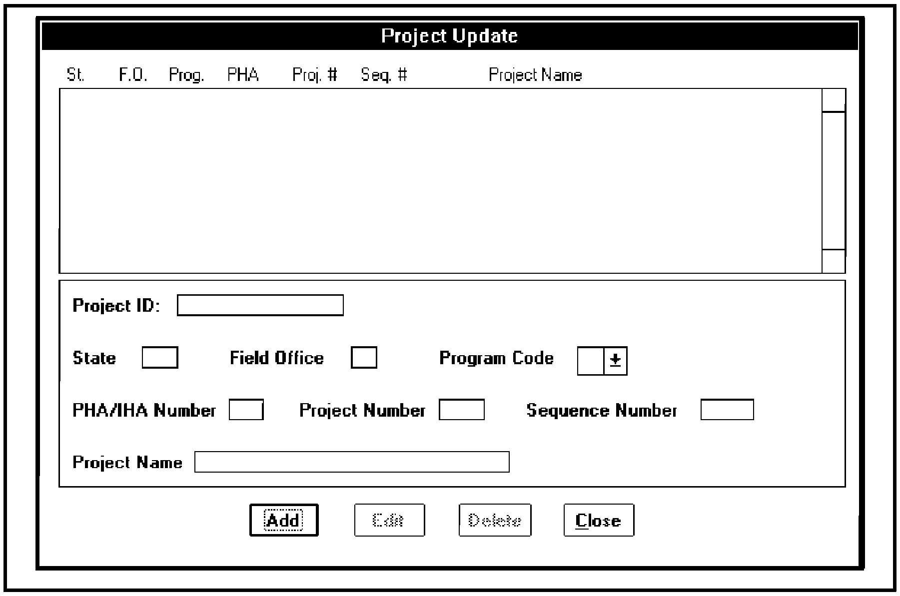


6. Repeat steps 4 and 5 as appropriate to change page ORIENTATION and PAPER.

7. Hit the ENTER key or click the OK button to save the printer settings and close the Printer Setup window.

Housing Authority Project Information

FRS creates a database of all projects administered by an HA. The database provides a centralized mechanism for maintaining and validating project information . Project numbers to be used to complete HUD-50058 forms must be added to the HA Project Information database before they can be used.



To add projects to the Housing Authority Project Database:

1. Select PROJECT function from the FRS Main Menu.

2. Select the ADD button on the Project Update window.
   The State data entry field will be highlighted.

3. Enter project number components in the respective data entry boxes.

   - Enter State code.

   - Field Office Code

   - Program Code

   - PHA/IHA Number

   - Project Number, if necessary

   - Sequence Number, if necessary

   - Project Name, if necessary.

Note: Public and Indian Housing project numbers must contain all of the required detailed data elements in step 3. All 8-digit project numbers must be converted to the 11-digit format.

4. Select the SAVE button to save the Project information.

   Repeat steps 2 through 4 for each HA project.

5. Select the CLOSE button to return to the Main Menu.

Entering HUD-50058 Information

Tenant information can be entered into the FRS tenant database as it is received from the tenant. Data collection screens are displayed in a format similar to the HUD-50058 form. Both the Head of Household Name and Head of Household Social Security number are required to save a tenant file to the database. Once a file has been created, information can be added, updated and deleted from the file as necessary. Files that have incorrect or incomplete information will cause an error message to be displayed during the data entry process. While the user may save a tenant file with incorrect or incomplete information, all errors must be corrected before the FRS will submit a tenant file to the MTCS Processing Center.

Tenant information can be entered in two ways. Tenants who have previously had information entered in the tenant database can use their existing tenant information to create a Reexamination, Redetermination, Portability Move-Out, Other Change of Unit, or End Participation record. All other tenants who have no data on the tenant database can be added to the database by creating a new tenant file.

*Note: If you attempt to create a **new** tenant file for a tenant that already exists on the tenant database (same Last name and Social Security Number), an error message will be displayed indicating that a file already exists for that tenant. If the error message is displayed, you must select FILE function and the OPEN option from the Main Menu.*

To add a tenant file to the database :

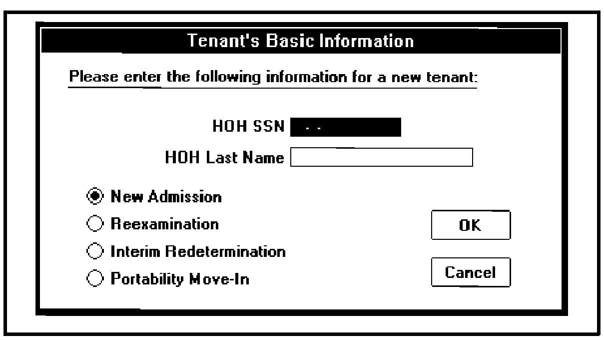
1. Select the FILE function from the Main Menu.

2. Select NEW from the pull down menu.
 *The **Tenant Basic Information** screen will be displayed.*

Tenant Basic Information

1. Enter the Head of Household Social Security Number and Head of Household Last Name.

2. Select the Transaction Type for the record to be created.
 Click the mouse on the appropriate radio button. OR hit the TAB key to highlight the appropriate radio button and hit the ENTER key.



3. Select the OK button to proceed to the next screen.
 ***People who live in the home** screen will be displayed with the Head of Household information that was entered.*

To open a tenant file already on the database :

1. Select the FILE function from the Main Menu.

2. Select OPEN from the pull down menu.
   The ***SEARCH*** *screen will be displayed. FRS will search the tenant database for a tenant file.*

3. Enter known tenant information. At least one search criteria field must be completed in order to enable database search.

   Note: If effective date is used, both the from date and to date must be entered.

4. Select the OK button to initiate the database search.
   The ***SEARCH RESULTS*** *screen will be displayed.*

5. Select the tenant file to be opened.
   Use the mouse or the up or down arrow to highlight the desired tenant line. Type the TAB key.

6. Select the appropriate transaction radio button.
   Use the mouse to select the proper transaction type for this report. OR use the up or down arrow key to highlight the proper transaction type, then type the ENTER key to select it.

7. Select the action to be performed.

   Delete - Deletes the selected tenant file from the database

   Error Correction - Displays the MTCS Error Correction text for the selected tenant

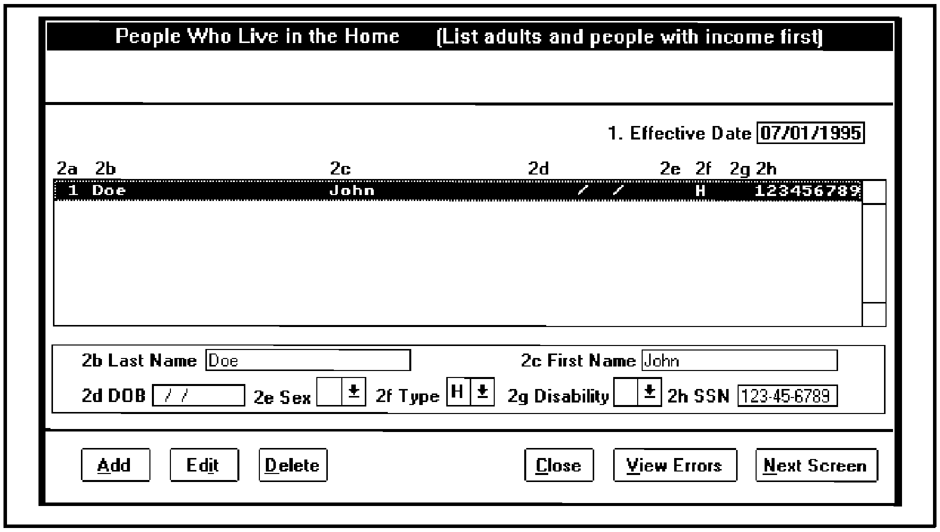
   Update - Enables update selected tenant record. OR creates new tranaction for selected
   tenant

   People who live in the home *screen will be displayed. Previously entered family information is shown.*

<u>People who live in the Home</u>

1. Select the EDIT button on the bottom of the screen to edit entries shown on the family member list. OR select the ADD button to insert additional family members on the family member list. *The effective date field will be highlighted.*

   Note: If this is a new tenant file, only partial information is listed for the Head of Household. You must select EDIT to complete the remaining information.



2. Enter family member characteristics. If an error message is displayed during data entry, use the mouse to click on the data field to be corrected. OR hit the TAB key until the desired field is highlighted.

   - Enter the Effective date of the transaction. Date should be entered in mm/dd/yyyy format.
   - Enter the Last Name of the family member. Hit the TAB key.
   - Enter the First Name of the family member. Hit the TAB key.
   - Enter the Date of Birth of family member. Date should be entered in mm/dd/yyyy format.

3. Select the appropriate sex of the family member.

4. Select the appropriate person type code for the family member.

5. Select the appropriate disability status for the family member.

6. Enter family member Social Security number.

7. Select the SAVE button to save the family information to the tenant database. Repeat steps 2 through 7 for all people who live in the household.

8. To proceed to the next screen, select the NEXT SCREEN button.

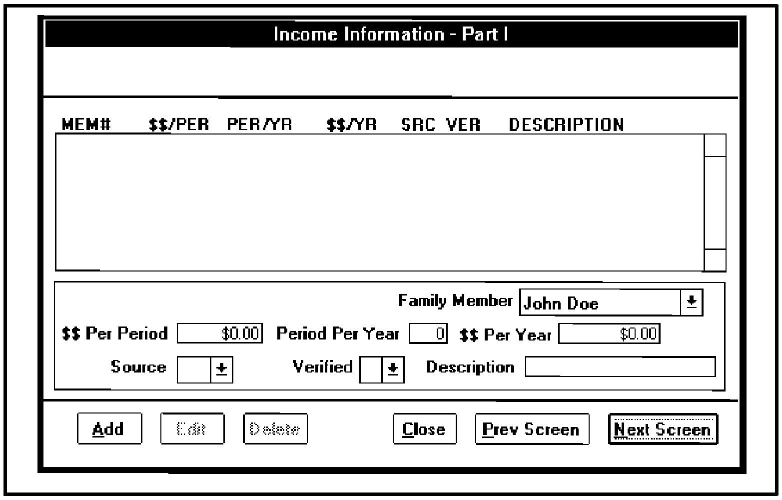
   To exit tenant file and return to the Main Menu, select CLOSE button.

   Note: The VIEW ERRORS button on the *People who live in the Home* screen enables display of all fatal errors encountered for a selected tenant. Once all available data has been entered, you can select this button to view the list of data fields that must be corrected before the tenant record will be transmitted to the MTCS Processing Center.

Income Information - Part I

1. Select the EDIT button on the bottom of the screen to edit entries shown on the income

information list. OR select ADD button to insert family member income information.
If the family no income, simultaneously type the ALT key and the 'N' key on the keyboard to proceed to the next screen.



2. Select the name of the family member whose income is being reported.
Use the mouse to click the list arrow then select the appropriate family member. OR use the up or down arrow to highlight the appropriate family member. Hit the TAB key to select and proceed to the next data field.

3. Enter member income information. If an error message is displayed during data entry, use the mouse to click on the data field to be corrected. OR hit the TAB key until the desired field is highlighted.

   - Enter dollars per period. Hit the TAB key. Use the '.' to enter cents as needed.

   - Enter periods per year. Hit the TAB key. Dollars per year will be calculated for you.

   - If dollars per year is not displayed, enter this amount. Hit the TAB key. Use the '.' to enter cents as needed.

4. Select the appropriate income source code for the income entered above.

5. Enter verification information for this income. Select yes if income has been verified. Select no if income will be verified at a later time.

   Note: The FRS will track the income verification field and will not transmit files if verification has not been completed.

6. Enter the description of the income source, if necessary. Hit the TAB key.

7. Select the SAVE button to save the family information to the tenant database.

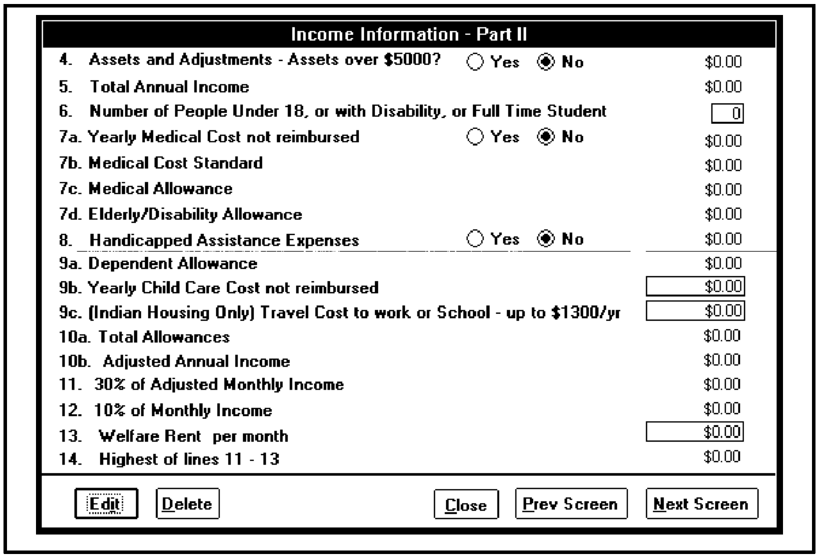
   Repeat steps 1 through 7 for all income earned by family members in the household. Multiple incomes can be listed for any family member.

8. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button.

Income Information - Part II

1. Select the EDIT button on the window to start entering income information.

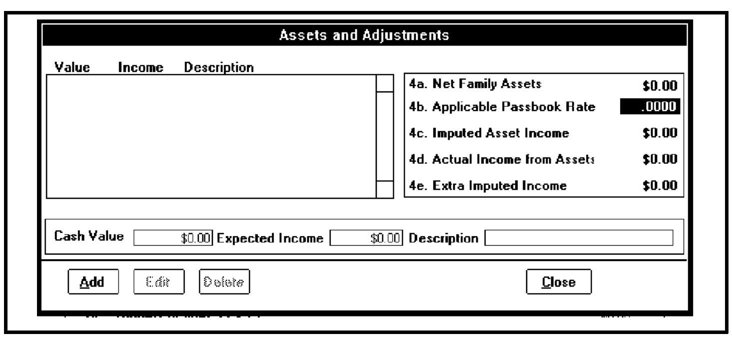


2. Enter income information.

Note: Most of the fields on this window are already filled with data based on information you entered on the preceding windows. The software will highlight the fields on the windows that require data entry.

(a) Answer Assets and Adjustments question
• ***If the family has assets below $5000***, click the mouse on the NO radio button. OR hit the space bar to highlight the NO radio button, then hit the ENTER key. Hit the TAB key to proceed to step (b).

• ***If the family has assets over $5000***, click the mouse on the YES radio button. OR hit the ENTER key. The Assets and Adjustments Worksheet will be displayed.



To enter Assets and Adjustments for the family:

- Enter the applicable passbook rate provided by your Field Office.

- Select the ADD button to begin entering asset information.

- Enter the cash value of the asset. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

- Enter the expected asset income amount. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

- Type the asset description. Hit the TAB key.

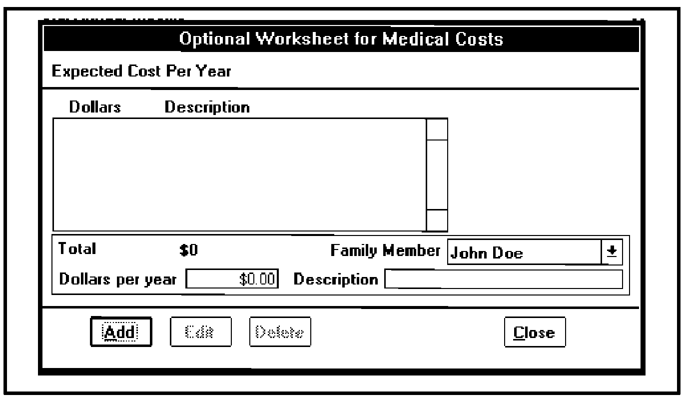
- Select the SAVE button to save the income information to the tenant database.

- To return to the tenant data entry windows, select CLOSE button.

(b) Enter the number of people in the household under 18 years, or with disabilities, or full-time students. Hit the TAB key.

(c) Answer Yearly Medical Cost not reimbursed question.
• ***If the family does not have unreimbursed medical costs***, click the mouse on the NO radio button. OR hit the space bar to highlight the NO radio button, then hit the ENTER key. Hit the TAB key to proceed to step (d).

• ***If the family has unreimbursed medical costs***, click the mouse on the YES radio button. OR hit the ENTER key. The Worksheet for Medical Costs will be displayed.



To enter Head of Household and Spouse Medical Costs:

- Select the ADD button to begin entering asset information.

- Select the family member for which the medical costs will be added. *Use the mouse to click the list arrow then select the appropriate family member. OR use the up or down arrow to highlight the appropriate family member. Hit the TAB key to select and proceed to the next data field.*

- Enter the yearly medical costs for the selected family member. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

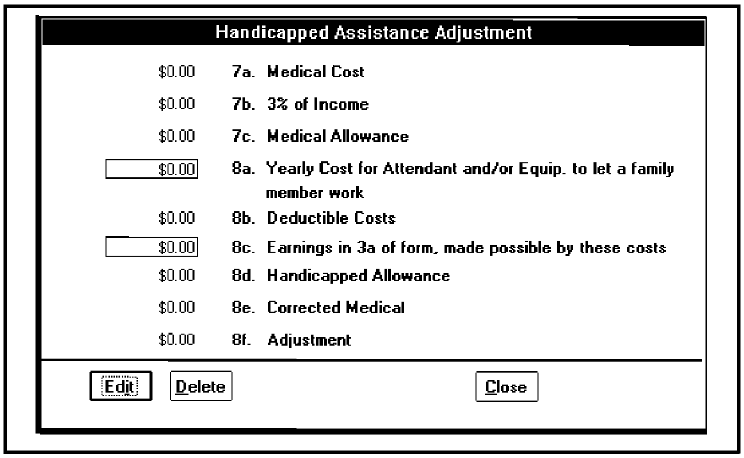
- Type the medical cost description. Hit the TAB key.

- Select the SAVE button to save the income information to the tenant database.

- To return to the tenant data entry windows, select CLOSE button.

(d) Answer Handicapped Assistance Expense question.
• ***If the family does not have handicapped assistance expenses***, click the mouse on the NO radio button. OR hit the space bar to highlight the NO radio button, then hit the ENTER key. Hit the TAB key to proceed to step (e).

• ***If the family has handicapped assistance expenses***, click the mouse on the YES radio button. OR hit the ENTER key. The Handicapped Assistance Adjustment Worksheet will be displayed.



To enter Handicapped Assistance Allowances:

- Select the EDIT button to begin entering asset information.

- Enter the yearly cost for attendant and/or equipment to allow family member work. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

- Enter income amount earned due to these handicapped assistance allowances. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

- Select the SAVE button to save the income information to the tenant database.

- To return to the tenant data entry windows, select CLOSE button.

(e) Enter unreimbursed yearly Child Care Costs for each child under 13 years old, where care is necessary to enable a family member to be gainfully employed or to further his or her education. Use the '.' to enter cents as needed. Hit the TAB key.

(f) Enter Travel cost.
• ***If the family is not in the Indian Housing program***, hit the TAB key to proceed to step (g).

• ***If the family is in the Indian Housing program but <u>does not have</u> travel cost to work or school***, hit the TAB key to proceed to step (g).

• ***If the family is in the Indian Housing program <u>has</u> travel cost to work or school***, enter the travel cost amount, then hit the TAB key to proceed to step (g).

(g) Enter Welfare rent per month, if any.
• ***If the family <u>does not</u> have any welfare rent***, hit the TAB key to proceed to step 3.

• ***If the family <u>has</u> welfare rent***, enter the welfare rent amount, then hit the TAB key to proceed to step 3.

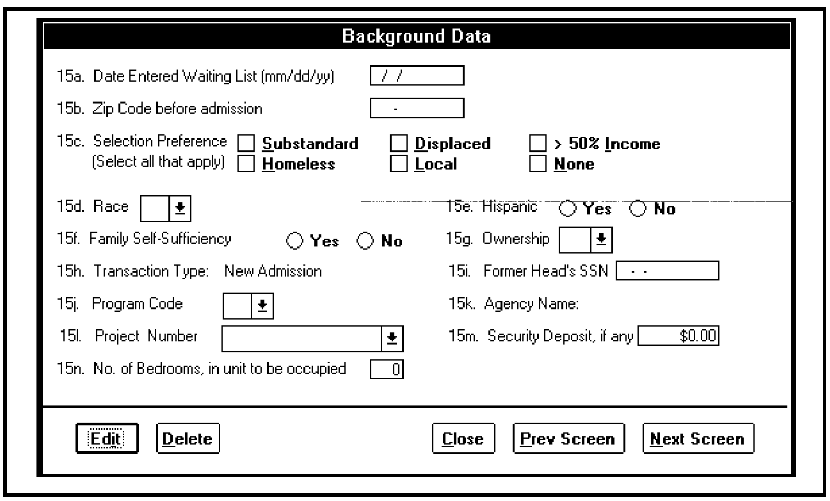
3. Select the SAVE button to save the income information to the tenant database.

4. To proceed to the next screen, select the NEXT SCREEN button.
Use the mouse to click the NEXT SCREEN button. OR hit simultaneously type the ALT key and the 'N' key.

To exit tenant file and return to the Main Menu, select CLOSE button.

<u>Background Data</u>

1. Select the EDIT button on the window to start entering Background Data.
***People who live in the home** screen will be displayed with the Head of Household information that was entered.*



2. If this is a new admission record, enter the date entered waiting list, then hit the TAB key. Date must be in mm/dd/yyyy format. For all other record types, hit the TAB key to proceed to the next data field.

Note: Some of the fields on this window are already filled with data based on information you entered on the preceding windows. The software will highlight the fields on the windows that require data entry.

3. Enter the zip code before admission, then hit the TAB key. If a 5-digit format is used, hit the TAB key to proceed to the next data field.

4. If this is a new admission record, enter the preference codes for families that qualified at the time of admission. Select all that apply. If no preference applies, select NONE.

To select preferences:
Use the mouse to click the selection boxes in front of the preference codes. OR use the TAB key to highlight the appropriate preference code, then hit the ENTER key to select.

To deselect preferences:
Use the mouse to click the selection box of the preferences to be removed. OR use the TAB key to highlight the preference to be removed, then hit the ENTER key.

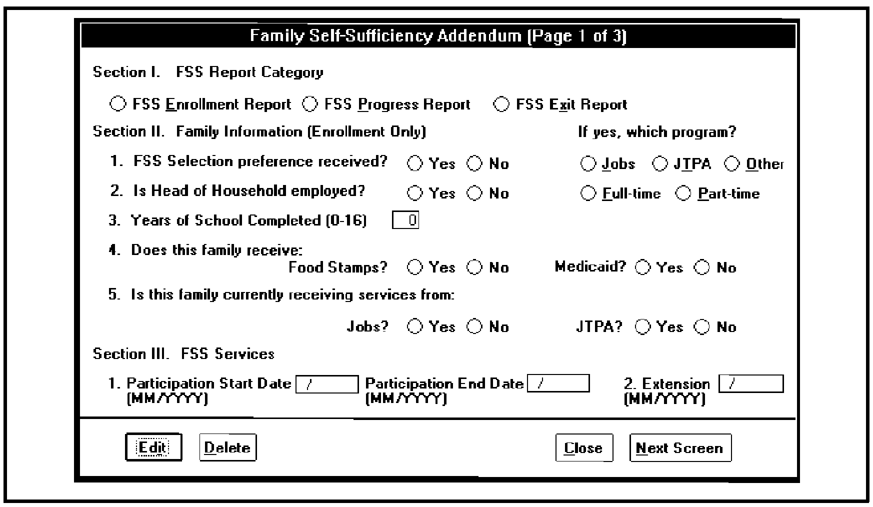
5. Enter the race code for the head of household.

6. Answer Hispanic origin question.
• ***If the head of household is Hispanic***, click the mouse on the YES radio button. OR hit the ENTER key to highlight the YES radio button, then hit the TAB key to proceed to the next data field.

   • ***If the head of household is not Hispanic***, click the mouse on the NO radio button. OR hit the space bar to highlight the NO radio button, then hit the ENTER key. Hit the TAB key to proceed to the next data field.

7. Answer Family Self-Sufficiency question.
• ***If the head of household does not have a FSS Program Participation contact*** that is still is in force or no one in the household participates in the FSS Program, click the mouse on the NO radio button. OR hit the space bar to highlight the NO radio button, then hit the ENTER key to select NO. Hit the TAB key to proceed to the next data field.

   • ***If the head of household has executed a FSS contract***, click the mouse on the YES radio button. OR hit the ENTER key to select YES radio button. The Family Self-Sufficiency Addendum will be displayed.



To enter or edit family self-sufficiency information for all family member participants:

- Select the EDIT button to insert or update FSS form responses.

- Respond to FSS form questions.
Use the mouse to click the appropriate responses. OR use the arrow keys to highlight the appropriate response, then press the ENTER key to select.

- Enter the participation dates and the extension date, as needed. Dates must be entered in mm/yyyy format.

- Select the SAVE button to store the family information.

- Proceed to the next screen.
Use the mouse to click the NEXT SCREEN button. Or simultaneously press the ALT and the 'N' key.

- Enter the services provided to each family member participating in the FSS program.

  - *Select the ADD or EDIT button.*

  - *Select the family member to ADD or EDIT. Use the mouse to click the list arrow and select family name. Or use the space bar to display family list then use the arrows to highlight family member name then hit ENTER key to select.*

  - *Select the appropriate service boxes. Use the mouse to click the box(es) in front of the desired service(s). Or use the TAB button to highlight the desired service(s) then press the ENTER key to select.*

  - *Save the FSS service information. Use the mouse button to click the SAVE button. Or simultaneously press the ALT and the 'S' key.*

  - *Proceed to the next screen. Use the mouse to click the NEXT SCREEN button. Or simultaneously press the ALT and the 'N' key.*

- Respond to remaining FSS form questions.

- Select the SAVE button to store the family information.

- Select the CLOSE button to store the family information.

8. Answer the homeownership participation question.
   • ***If the head of household <u>does not</u> participate in a Homeownership program***, hit the TAB key to proceed to the next data field.

   • ***If the head of household <u>does</u> participate in the Homeownership***, enter the appropriate program code or click the mouse on the list arrow and select from the list. OR use the up or down arrow to highlight the appropriate program code, then hit the TAB key to proceed to the next data field.

9. ***If the head of household has changed since the last report***, enter the former head of household social security number.

   Note: If this is a new admission report, hit the TAB key to proceed to the next data field.

10. Select the program code for this family.

    Note: If the family is assisted with Moderate Rehabilitation funding that has been converted to a Rental Certificate, enter 5 in the Program Code field.

11. Select the project identification number to be used for this family.

    Note: Project numbers must be entered in the HA Project Number database before they can be used to complete the HUD-50058 form.

12. Enter the Security deposit, if any. Use the "." to enter cents as needed. Hit the TAB key to proceed to next data field.

13. Enter the number of bedrooms in the unit to be occupied. Hit the TAB key to proceed to the next data field.

14. Select the SAVE button to save the background data to the tenant database.

15. To proceed to the next screen, select the NEXT SCREEN button.

To exit tenant file and return to the Main Menu, select CLOSE button.
Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.

Note: Program Information windows will be displayed based on the program code selected on the Background Data window. The software will automatically display all windows necessary to complete the HUD-50058 form for the program selected for this family.

Public, Indian Rental & Turnkey III

1. Select the EDIT button on the window to start entering rental information.

2. Enter Ceiling Rent. Use the "." to enter the cents as needed. Hit the TAB key to proceed to the next data field.

3. Enter Utility allowance. Enter zero if no utility allowance applies. Hit the TAB key to proceed to the next data field.

4. Select the SAVE button to save the information to the tenant database.

5. Return to the Main Menu.
   Click the mouse on the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key. The Main Menu will be displayed.

Indian Mutual Help

1. Select the EDIT button on the window to start entering Background Data.

2. Enter Mutual Help and Occupancy Agreement (MHOA) Percentage. The percentage must be entered as a decimal, e.g. enter .15 for 15%. Hit the TAB key to proceed to the next data field.

3. Enter Utility allowance. Enter zero if no utility allowance applies. Hit the TAB key to proceed to the next data field.

4. Enter the HA Administrative Charge. Hit the TAB key to proceed to the next data field.

5. Enter the maximum monthly payment, if applicable.

6. Select the SAVE button to save the information to the tenant database.

7. Return to the Main Menu.
   Click the mouse on the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key. The Main Menu will be displayed.

Section 8

1. Select the EDIT button on the window to start entering rental information.

2. **If the family income is over the low income limit,** enter the Section 8 Admissions code.
   Use the mouse to click the list arrow, then select the appropriate Admission code. OR use the up or down arrow to highlight the appropriate Admission code, then hit the TAB key to select.

3. Enter the Section 8 Unit Address information.
   - Enter street address. Hit the TAB key.

- Enter Apartment number. Hit the TAB key.
- Enter city. Hit the TAB key.
- Enter state. Hit the TAB key.
- Enter zip code. Hit the TAB key.

4. Enter Owner Name. Hit the TAB key.

5. Enter Owner TIN/SSN. Hit the TAB key.

6. Enter date unit last passed inspection. Date must be entered in mm/dd/yyyy format.

7. Select the SAVE button to save the information to the tenant database.

8. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button.
   Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.

Section 8 Certificates and Vouchers

1. Select the EDIT button on the window to start entering rental information.

2. Enter the number of bedrooms Certificate or Voucher.

3. Answer the unit occupancy question as appropriate.
   If the family lived in this unit on the last report, select the NO radio button.
   Use the mouse to click the NO radio button. OR use the space bar to highlight the NO radio button and hit the ENTER key to select the NO radio button. Hit the TAB key to proceed to the next screen.

   If the family lived is moving or recently move to this unit, select the YES radio button.
   Use the mouse to click the YES radio button. OR hit the ENTER key to select the YES radio button, then hit the TAB key to proceed to the next screen.

4. Answer the portability question, as appropriate.
   If the family <u>did not</u> move into your HA's jurisdiction under portability, select the NO radio button.
   Use the mouse to click on the NO radio button. OR use the space bar to highlight the NO response, then hit the ENTER key to select. Hit the TAB key to proceed to the step 7 data field.

   If the family <u>did</u> move into your HA's jurisdiction under portability, select the YES radio button.
   Use the mouse to click on the YES radio button. OR hit ENTER key to select the YES radio button. Hit the TAB key to proceed to the next field.

5. **If this family moved under portability,** enter the cost billed per month to another HA. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field. (See the MTCS Information Packet for additional details)

6. **If this family moved under portability,** enter the 8-character HA identification number used to bill the HA. Hit the TAB key to proceed to the next data field. (See the MTCS Information Packet for additional details)

7. **If the family lives in one of the special housing types listed,** select as applicable.

   To select preferences:
   Use the mouse to click the selection boxes in front of the preference codes. OR use the TAB key to highlight the appropriate preference code, then hit the ENTER key to select.

   To deselect preferences:
   Use the mouse to click the selection box of the preferences to be removed. OR use the TAB key to highlight the preference to be removed, then hit the ENTER key.

8. Select the SAVE button to save the information to the tenant database.

9. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button.
   Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.

Section 8 Certificates

1. Select the EDIT button on the window to start entering rental information.

2. **If this is a New Admission report,** enter the Fair Market Rent or the Exception Rent. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

3. Enter the monthly rent payable to the owner specified in the HAP contract. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

4. Enter the Utility Allowance amount. Use the "." to enter cents as necessary. Enter 0 if none applies.

5. Answer the utility cost question.
   If the highest cost utility is <u>not</u> included in the contract rent, select the NO radio button.
   Click the mouse on the NO radio button. OR use the space bar to highlight the NO response, the hit the ENTER key to select the NO radio button. Hit the TAB key to proceed to the next data field.

   If the highest cost utility is included in the contract rent, select the YES radio button.
   Click the mouse on the YES radio button. OR hit the ENTER key to select the YES response. Hit the TAB key to proceed to the next data field.

6. Select the SAVE button to save the information to the tenant database.

7. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button.
   Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.

Section 8 Vouchers

1. Select the EDIT button on the window to start entering rental information.

2. Enter the payment standard for the voucher specified unit size. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

3. **If this family receives Sec 236 or Sec 515 subsidies,** enter the current Market Rent for this unit. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

4. **If this family receives Sec 236 or Sec 515 subsidies,** enter the current subsidized rent for this unit. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

5. Enter the utility allowance. Use the "." to enter cents as necessary. Enter 0 if no utility allowance applies. Hit the TAB key to proceed to the next data field.

6. Enter the rent payable by the family to the owner. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

7. Select the SAVE button to save the information to the tenant database.

8. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button.
   Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.

Section 8 Moderate Rehabilitation

1. Select the EDIT button on the window to start entering rental information.

2. Enter the rehabilitation debt service currently applicable to this unit. Do not enter any amount if the rehabilitation loan has been paid off. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

3. Enter the utility allowance. Use the "." to enter cents as necessary. Enter 0 if no utility allowance applies. Hit the TAB key to proceed to the next data field.

4. Enter the Housing Assistance Payment (HAP) contract number. (See the MTCS Information Packet for additional instructions)

5. Answer utility cost question.
   If the highest cost utility is <u>not</u> included in the contract rent, select the NO radio button.
   Click the mouse on the NO radio button. OR use the space bar to highlight the NO response, the hit the ENTER key to select the NO radio button. Hit the TAB key to proceed to the next data field.

   If the highest cost utility is included in the contract rent, select the YES radio button.
   Click the mouse on the YES radio button. OR hit the ENTER key to select the YES response. Hit the TAB key to proceed to the next data field.

6. Answer Moderate Rehabilitation SRO question.
   If the family's unit is <u>not</u> subsidized under the Single Room Occupancy program, select the NO radio button.
   Click the mouse on the NO radio button. OR use the space bar to highlight the NO response, the hit the ENTER key to select the NO radio button. Hit the TAB

key to proceed to the next data field.

If the family is subsidized under the Single Room Occupancy program, highest cost utility is included in the contract rent, select the YES radio button. *Click the mouse on the YES radio button. OR hit the ENTER key to select the YES response. Hit the TAB key to proceed to the next data field.*

7. Select the SAVE button to save the information to the tenant database.

8. To proceed to the next screen, select the NEXT SCREEN button.

   To exit tenant file and return to the Main Menu, select CLOSE button. *Use the mouse to click the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key.*

Section 8 Moderate Rehabilitation Converted to Certificate

1. Select the EDIT button on the window to start entering rental information.

2. **If this is a New Admission report,** enter the Fair Market Rent or the Exception Rent. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

3. Enter the monthly rent payable to the owner specified in the HAP contract. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

4. Enter the Utility Allowance amount. Use the "." to enter cents as necessary. Enter 0 if none applies.

5. Answer the utility cost question.
   If the highest cost utility is <u>not</u> included in the contract rent, select the NO radio button.
   Click the mouse on the NO radio button. OR use the space bar to highlight the NO response, the hit the ENTER key to select the NO radio button. Hit the TAB key to proceed to the next data field.

   If the highest cost utility is included in the contract rent, select the YES radio button.
   Click the mouse on the YES radio button. OR hit the ENTER key to select the YES response. Hit the TAB key to proceed to the next data field.

6. Select the SAVE button to save the information to the tenant database.

7. Return to the Main Menu.
   Click the mouse on the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key. The Main Menu will be displayed.

Manufactured Home

1. Select the EDIT button on the window to start entering rental information.

2 Enter the FMR or exception rent. Hit the TAB key to proceed to the next data field. Use the "." to enter cents as necessary.

3. Select the appropriate space width of the manufactured home.
   Use the mouse to click on the radio button for either single width or double width. OR use the TAB key to highlight the desired space width selection, then hit the ENTER key to select. Hit the TAB key to proceed to the next data field.

4. Answer home furnishing question.
   If the furniture was <u>not</u> included in the purchase price, select the NO radio button.
   Use the mouse to click on the NO radio button, OR use the space bar to highlight the NO response, then hit ENTER to select. Hit the TAB key to proceed to the next data field.

   If the furniture was included in the purchase price, select the YES radio button.
   Use the mouse to click on the YES radio button, OR hit the ENTER key to select YES. Hit the TAB key to proceed to the next data field.

5. Enter the monthly amortization payment. Use the "." to enter cents as necessary. Enter 0 if no monthly amortization payment applies.

6. Enter the utility allowance. Hit the TAB key to proceed to the next data field. Use the "." to enter cents as necessary. Enter 0 if no utility allowance applies.

7. Enter the rent payable by the family to the owner. Use the "." to enter cents as necessary. Hit the TAB key to proceed to the next data field.

8. Select the SAVE button to save the information to the tenant database.

9. Return to the Main Menu.
   Click the mouse on the CLOSE button. OR hit simultaneously type the ALT key and the 'C' key. The Main Menu will be displayed.

Transmitting Tenant Records to MTCS

FRS prepares the SprintMail tenant files and transmits them to the MTCS Processing Facility. Tenant files are created by performing a search of the tenant database to select all tenant files that have verified income and no fatal errors. FRS selects tenants to add to the submission file based on projects selected by the user. Projects selected that had no tenant activity will cause a no-activity file to be created.

<u>File Preparation</u>

1. Select TRANSMIT from the FRS Main Menu.

2. Select the PREPARE PROJECTS TO SEND option.

3. Select the projects to be searched for complete tenant files.
Use the mouse to double-click the desired project(s). OR use the up or down arrow key to highlight the desire project , then type the ENTER key to select.
An asterisk (*) will appear next selected projects.

Note: Tenant files with effective dates greater than the current date will not be included in the submission file.

As the project information lines are highlighted, the data boxes on the bottom of the screen will display:

- Project Name

- Project Number

- Number of tenants in the selected project that are ready for transmission

- Number of incomplete tenant files or files with unverified income

6. Enter Reporting Year.
Use the mouse to click on the Reporting Year box. Year must be entered in yyyy format.

7. Enter Reporting Month.
Month must be entered in mm format.

8. Choose the CLOSE button to return to FRS Main Menu.

<u>Send Tenant Records to MTCS</u>

1. Select TRANSMIT from the FRS Main Menu.

2. Select the SEND HUD-50058 DATA option.
FRS will dial into the SprintMail Network and send all tenants from selected projects that are complete and have been updated since the last submission.

Note: If your SprintMail password has been changed since the last submission, you must setup your new password in FRS. Refer to the *SprintMail Setup* section for additional information.

<u>Unverified Income/Incomplete Tenant File List</u>

A list of the tenant files indicated on the *Prepare Projects to Send* screen as incomplete or unverified can be viewed or printed using the *Unverified Income/Incomplete Tenant File List* option on the Main Menu. FRS will list tenants that have been entered in the HA database since the last transmission.

These tenant files will not be submitted until all required information has been provided and income has been verified. Individual tenant records can be printed or viewed by selecting REPORTS on the FRS Main Menu. (Refer to REPORTS section for instructions on printing reports. Refer to *Entering 50058 Information* for instructions on updating tenant information)

To prepare the ***Unverified Income/Incomplete Tenant File*** List

1. Select TRANSMIT from the FRS Main Menu.

2. Select the UNVERIFIED INCOME/INCOMPLETE TENANT LIST option.

3. Choose VIEW or PRINT from the secondary option list.

   Note: Printer must be connected to a local printer if PRINT option is selected. Refer to PRINTER SETUP for additional information.

4. Choose the OK button to return to the FRS Main Menu.

View Housing Authority Data Submission History

FRS keeps a log of tenant file submissions to the MTCS Processing Facility. The submission log tracks date and time of submission, submisison number, number of records submitted, number of errors identified by MTCS. Negative one (-1) in the *Error Records* column indicates that processing results for that tenant file have not been received.

1. Select TRANSMIT from the FRS Main Menu.

2. Select VIEW SUBMISSION HISTORY option.

3. Choose the CLOSE button to return to the FRS Main Menu.

Receive Error Correction Files from MTCS

FRS enables electronic receipt of error files from the MTCS Processing Facility. The error files contain a list of the errors encountered during the MTCS edit process. All fatal errors identified must be corrected and the tenant information resubmitted to the MTCS Processing Facility.

To receive an error file:

1. Select RECEIVE from the FRS Main Menu.
2. Select RETRIEVE ERROR FILE option.
   FRS will dial into the SprintMail Network and obtain any error files from your mailbox.

   Note: *If you did not delete your previous error file(s), the new error file will append onto the end of the previous error file(s).*

To view an error file:

1. Select RECEIVE from the FRS Main Menu.
2. Select VIEW ERROR FILE option.
3. Review the Errors Identified by MTCS.
4. Choose OK to return to the FRS Main Menu.

To print an error file:

1. Select RECEIVE from the FRS Main Menu.
2. Select PRINT ERROR FILE option.

Note: Printer must be connected to a local pinter if PRINT option is selected. Refer to PRINTER SETUP for additional information.

To delete an error file:

1. Select RECEIVE from the FRS Main Menu.
2. Select DELETE ERROR FILE option.
3. Confirm deletion by choosing the OK button.

FRS REPORTS

FRS provides a limited number of reports using tenant information available in the HA database. Any of these reports can either be viewed on-line or printed to a local printer. Reports available in FRS are:

Family Report - HUD-50058
Prepares an electronic replica of the HUD-50058 report

Recertification List - Sorted by Date
Prepares a list of tenants, sorted by effective date, with effective dates more than six months ago

Recertification List - Sorted by Tenant Social Security Number
Prepares a list of tenants, sorted by Social Security number, with effective dates more than six months ago

Tenant List - Sorted by Project
Prepares a list of tenants residing in a specific project

Unverified Income/Income Tenant Record List
Prepares a list of tenants with unverified income or incomplete tenant files

Family Report - HUD-50058

1. Select REPORTS from the FRS Main Menu.

2. Select FAMILY REPORT HUD-50058 option.

3. Choose VIEW or PRINT from secondary option list.

Note: Printer must be connected to a local printer if PRINT option is selected. Refer to PRINTER SETUP for additional information.

4. Enter all known criteria about existing family record.
   If you are searching by effective date, the "from" and the "to" dates are both required.

5. Select the OK button to begin search.

6. Highlight desired family record from search results screen.

7. Choose the OK button to view or print the desired tenant record.

8. Choose the OK button to view multiple pages of the report and to return to the FRS Main Menu.

Recertification List

1. Select REPORTS from the FRS Main Menu.

2. Select RECERTIFICATION LIST BY DATE or RECERTIFICATION LIST BY SSN.

3. Choose VIEW or PRINT from secondary option list.

   View Note: *While viewing a form/report you may zoom in on a particular area or view the next page by using the page up/down functions.*

   Print Note: Printer must be connected to a local printer if PRINT option is selected. Refer to PRINTER SETUP for additional information.

4. Choose the OK button to return to the FRS Main Menu.

Tenant List

1. Select REPORT**S** from the FRS Main Menu.

2. Select TENANTS LIST BY PROJECT option.

3. Choose VIEW or PRINT from secondary option list.

   View Note: *While viewing a form/report you may zoom in on a particular area or view the next page by using the page up/down functions.*

   Print Note: Printer must be connected to a local printer if PRINT option is selected. Refer to PRINTER SETUP for additional information.

4. Select desired project.

5. Choose the OK button to review list.

6. Choose the OK button to return to the FRS Main Menu.

Unverified Income/Incomplete Tenant Record List

1. Select REPORTS from the FRS Main Menu.

2. Select UNVERIFIED INCOME/INCOMPLETE TENANT LIST option.

3. Choose VIEW or PRINT from secondary option list.

   View Note: *While viewing a form/report you may zoom in on a particular area or view the next page by using the page up/down functions.*

   Print Note: Printer must be connected to a local printer if PRINT option is selected. Refer to PRINTER SETUP for additional information.

4 Choose the OK button to return to the FRS Main Menu.

Options

Reindex Database

Reindex rebuilds all index files associated with the database. Occasionally, index files become corrupted. This option will reconstruct all index files.

1. Select OPTIONS from the FRS Main Menu.
2. Select REINDEX DATABASE.
3. Choose OK to confirm REINDEX Request.

Backup Database

Backup copies all database files to the backup directory within the FRS directory. All users should also backup their hard drive on a regular basis to ensure no data loss.

1. Select OPTIONS from the FRS Main Menu.
2. Select BACKUP DATABASE option.
3. Choose OK to confirm BACKUP Request.

Restore Database

Restores all database files from the backup directory located within the FRS directory.

1. Select OPTIONS from the FRS Main Menu.
2. Select RESTORE DATABASE option.
3. Choose OK to confirm RESTORE Request.

HELP

Online Help in not available in this version of FRS.
Please contact the MTCS HOTLINE at 1-800-366-6827 for technical assistance.

EXIT

Choose **EXIT** from the FRS Main Menu to end the FRS program and return to the Windows Program Manager.